

# Individual Tax Return Checklist

When you come to see us at tax time, please bring in the following information to assist us in completing your tax return properly.



**PLEASE NOTE:** The ATO will no longer be issuing refund cheques and all refunds will be via EFT, so please ensure you have all your banking details to avoid any delays.

Please contact us on 8344 6011 if you have any questions or require further information.

## Income earned statements

- PAYG Summaries
- Lump Sum payments (eg: Eligible Termination Payment Redundancy statement)
- Social Security, pensions, allowance documents/statements. This includes parenting payments and Dad & Partner Pay from Centrelink
- Pensions/annuities deductible amount
- Partnership distribution
- Rental Income
- Capital Gains Tax statements (assets sold)
- Bank statements summary (interest received)
- Share dividend statements
- Managed Fund Investments tax statements
- Tax statements from stockbrokers
- Income stream statements
- Contract notes for buy/sell transactions
- Foreign Source Income (including foreign pensions, investments and property)
- Trust distribution statements
- Statement for income received from life insurance payments
- Crypto Asset Manager Tax Statements

## Investment related deductions

- Interest/fees on borrowing for investment purposes (provide statement)
- Asset purchase agreements
- Asset sale document

## Other deductions

- Receipts of gifts / donations to charities
- Details of Income Protection Insurance premiums and ongoing financial planning advice to investment deductions

## Offsets

- Sole parents / spouse / housekeeper / low income / aged persons
- Spouse details (name, DOB, income)
- Spouse contributions to superannuation
- Dependants – name, DOB and legal responsibilities
- Superannuation pension rebates
- Zone details - if in a remote area
- Imputation credit information from dividend statements
- Superannuation if self employed

## Investment Property

- Date rental property was purchased (provide copy of settlement statement)
- Details of periods property was rented
- Rental statements from Agent or rent received
- Capital costs / Depreciator schedule
- Advertising costs
- Agent fees / commission
- Legal fees
- Body corporate fees
- Borrowing expenses
- Cleaning
- Council rates
- Gardening / lawn mowing
- Insurance
- Interest on loans
- Land tax
- General maintenance and repairs
- Pest control
- Water charges
- Bank fees
- Capital works deductions (building write off)
- Sundry rental costs

## Individual Tax Return Checklist (continued)

### Employment income deductions

- Financing lease statements
- Receipts for work-related deductions:
  - Travel
  - Car
  - Clothes
  - Laundry
  - Meals
  - Journal
  - Periodicals
  - Sun protection products
  - Seminars and courses
  - Mobile phone
  - Subscriptions
  - Union fees
  - Tools and equipment
  - ATO work from home journal
- Copy of log book
- Receipts for self-education expenses (eg: books / computer costs / car expenses / union fees / course fees)
- Stationary, telephone and postage costs

### Other useful information for new clients

- Previous year's accountant fees
- Last year's tax return
- Prior year tax losses
- Prior year capital losses
- Your ABN
- Bank account details
- Any PAYG instalments paid
- Credit card statements
- Loan statements
- Tax credit vouchers
- Details of any government debts

Please remember to have your current provide Bank Account details available to complete your return.

Has your postal address changed from the last tax return?

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Do we have your current email address?

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### NOTES

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*community based, family focussed*

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